IMAC QA Subcommittee
Meeting Minutes
May 23, 2005

Members Present:
Jackie Bennett, Racine County; Bernadette Connolly, DHFS/DHCF/BEM; Chris Elms, Dane County; Brian Fangmeier, DHFS/DHCF/BEM; Lisa Hanson, DHFS/DCHF/BHCE; Vicki Jessup, DHFS/DCHF/BEM; Kathy Judd, Dane County; Pam Lohaus, DHFS/OSF/Southern Region; Marilyn Rudd; DHFS/DHCF/BEM; Allison Espeseth (Covering Kids and Family); Marcia Williamson, DHFS/DHCF/BEM

Via Phone Conference:
Jacaie Coutant, Milwaukee County; Jennifer Winter, (Managed Health Services); Lorie Mueller, LaCrosse County

Members Absent:
Joann Ator, Door County; John Haine, DHFS/DHCF/BEM; Joanne Simpson, DHFS/DHCF/BEM

Guests
Brian King and Ramesh Rasipur (Deloitte Consulting); Phoua Her, DHFS/BEM/ Prog & Policy Resolution Ctr.

1. April 25, 2005 Meeting Minutes:
The April minutes were reviewed and approved as amended.

2. Current Error Rates on Active Cases:
The rate for four months through January 2005 is 5.0% statewide. Milwaukee is at 6.0% and the balance of the state is 4.2%.

3. Worker Dashboard Concept:
Ramesh and Brian from Deloitte presented a draft concept similar to one used in New Hampshire, Called "New Heights." The idea is to make current workflow more manageable. A "Worker Dashboard" would present one screen on CWW to workers that shows outstanding case-related actions, such as alerts, SMRFs, EVF's, expected changes, pending AG's, etc. From there a worker can drill down to get more details on specific cases.

A second screen called "Supervisor Dashboard" allows managers to monitor his/her unit's workloads, and to sort by types of worker actions that are outstanding.

A "County Dashboard" summarizes information at the county level, showing county-wise number of overdue applications for example, or number of open cases, etc.

The state seems to like the idea (as does this committee). Whether/when it will be done is not clear yet. The local agencies would have no cost in implementing it as it would be just part of the Care Worker Web (CWW).

In response to comments, Brian said that they could consider alerting supervisors if an exceptionally large number of alerts are deleted all at once, so the supervisor could see if they were actually "worked," or merely deleted. Also, there is no screen history, but agencies could print

screens or create a document to track numbers to compare over time. The screens could be either refreshed nightly, or show "real time."   None of those things have been decided.

4. Error-Prone Profiling (EPP):

Brian and Ramesh also presented EPP as a second idea, also used in New Hampshire.   The concept is to be pro-active in preventing errors and not re-active. Certain elements deemed to be error-prone (or certain workers and elements) could be flagged. Those cases could be either blocked from confirmation or flagged for a review by a supervisor.

New Hampshire targets error-prone workers, not elements, but either could be used. The worker scenario works better than element scenario according to Brian, as it gives more flexibility. The latter could create prodigious numbers of cases flagged which could be unmanageable.

It was suggested having the state create profiles, with the local agencies given the ability to add a few that are specific to their agency.

Questions/comments from the committee include: Can reports be created? Can it count flags? Would it allow a listing of case numbers of flagged cases? Milwaukee says they have pools of cases, where more than one individual works on the cases, so the worker profile might not work. Also whose supervisor would be assigned to get the "flag alert?" What problems will exist in agencies with Call Centers? Once flagged, can a case be put into a mini-driver-flow mode depending on the element involved? Can the supervisor be alerted to know a case has just been flagged? A history screen would be useful. Can an application date be entered somewhere? It will be important to have this flagging process by-pass cases that should have expedited FS.

 The group thinks they would like to see the "Dashboard" concept move ahead first, and the members feel there are more feedback and refinements needed on the EPP. Brian envisions if the ideas are refined, discussed and shown to IMAC with screen mock-ups, and if approved, the projects wouldn't get started until fall and could have a finish date early 2006.

5. MA Second Party Reviews Update:

Mary Moyer, the lead on the project, is on vacation, but Phoua Her was present and has worked closely with this.   Testing is occurring this week. They are wanting county help in testing, and LaCrosse, Dane and Racine will participate, as well as Lisa Hanson and others.   A typical review would take between 30 minutes to an hour. The next budget (not approved yet) says 2 per worker per agency per month.   There are possibly dollar resources provided for this additional task. The reviews will be in IMQA, and modeled after the FoodShare process. The sample will be extracted and loaded into IMQA. The first one will target family Medicaid program simplification. The sample can be changed periodically to focus on other types Medicaid.

6. Quality Assurance Plans (QAP):

Negative Action Reviews:

Jackie B expressed concernabout the time needed to now also do negative reviews; she would hope some monies would also be attached to this new directive, although with staffing shortages it doesn't help sometimes. Adding this requirement at the same time that MA second parties are starting is a problem.   Jacaie C. asked that the state provide instructions on how to do them efficiently.   She also pointed out that with worker pools and call centers, ES work is becoming task oriented rather than case oriented, making it more difficult to monitor things manually, such as whether a particular case has ten day or 30 day verification timelines.

 It was agreed that:

- Marcia would provide Marilyn with the Negative Action QC worksheet state QC uses, and also recent statistics on negative error types and causes. Marilyn will send to group members.
- Lisa will bring caseload statistics to the next meeting.
- Marilyn will write up the 5 options suggested at this meeting:
  - 1 negative per worker per month per agency
  - 1 negative/worker/mo/agency (and reduce actives to 1 per worker)
  - Negatives required only quarterly
  - 2 per worker/mo/agency negatives and 2 actives/wkr/mo/agency
  - Change the current 2-per-worker requirement to a percentage of total agency caseload, not tied to particular workers; suggested was ¾ active to ¼ negative.

7. Timeliness Monitoring:

Timeliness of application processing is becoming a big issue, since FNS states Wisconsin has a poor rate of timely FS issuance. This is for both 30-day applications and for 7-day expedited issuance. There was discussion of including timeliness in the QA Plans in the future. The group considered either a specified number of cases sampled and measured, or a requirement in the QAP that the agency describe how they ensure Priority Service appointments, expedited issuance and measure and monitor timely 30-day application processing. [Note: the group was leaning toward the latter, at least for this upcoming 2006 QAP; however, FNS has notified us they want a statement in the QAP requiring specified measurements to be made by each local agency.]   Lisa noted she is working on getting Timeliness Statistics programmed into IMQA for both State QC and for local agencies. These could be reviewed and entered at the same time an active FS case is reviewed.   Jacaie C. an Jackie B. will get back to Marilyn with the already-existing EOS report numbers they referred to in our discussion.

8. August Meeting back on the calendar: the group decided an August meeting is necessary in order to keep on schedule, although in past we have skipped it because of FS Conference.

9. Next Meeting: June 27, 2005 (Notetaker: Jackie Bennett)

Agenda Items:

- QAPs
- FS second party review process, including Negative Case Reviews

Submitted by: Marcia Willamson